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Figure 1

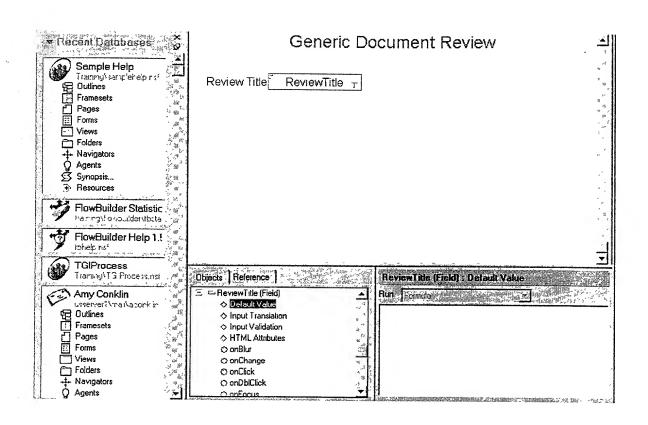
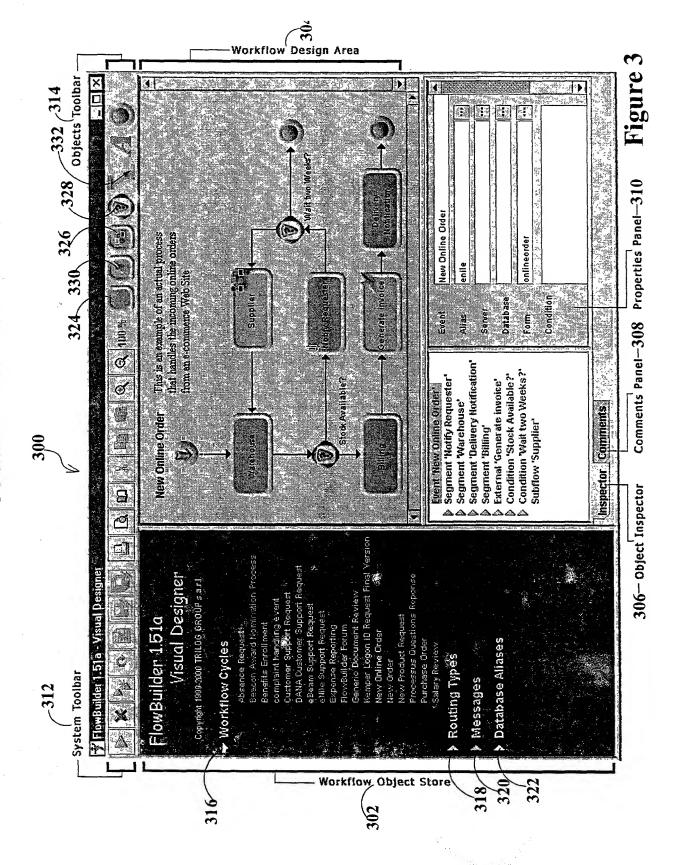


Figure 2



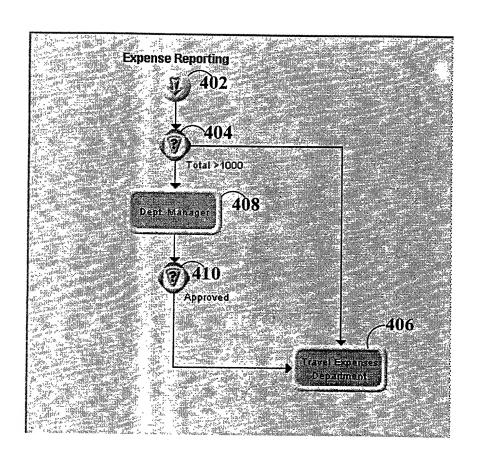


Figure 4



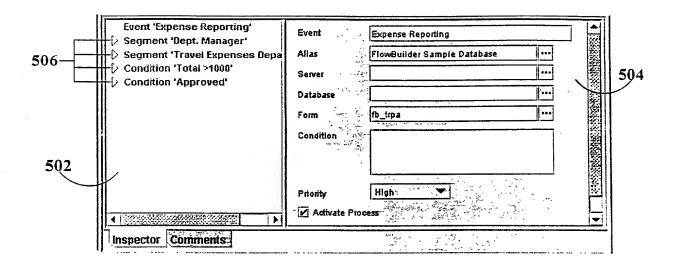


Figure 5

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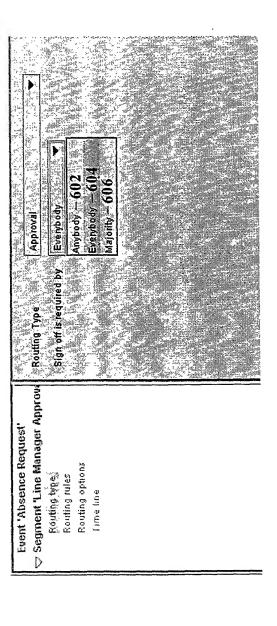


Figure 6a

Event 'Cycle'	
Segment 'Segment1' Routing type Routing rules	Routing Type Sign off is required by
Routing options Deadline date	Approval Combined Approval/Edit
Deadline handler	For information Review
Inspector Comments	Simple Review

Figure 6b

Event 'Expense Reporting' Segment 'Dopt. Manager'	Routing Rules	
Routing type	Always send to: Department Manager	3
Rauting idles Routing options		3
Deadline date		
Deadline handler Segment 'Travel Expenses Department'	Branching Label	
Condition 'Total >1000'		· #\
Previous result	Formula	£ 7
Formula On requester		<u> </u>
Condition 'Approved'	Simple Roles Department Manager	<u> </u>
••		
	Composed Roles	
		*. II
	Static Users	
		⊼ ∭
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Figure 7a

	702	
Event 'Expense Reporting' Segment 'Dept. Manager' Routing type Routing guies Routing outions	Routing Rules Allways send to Department Manager	
Deadline date Deadline handler Segment 'Travel Expenses Departm Condition 'Total >1000'	Branching Label Formula	704
Condition 'Approved'	Simple Roles Department Manager	
	Composed Roles. Static Users.	
	New Duplicate Delete	
Inspector Comments	And the second s	
	706 708 710	

Figure 7b

	802	804
Event 'Expense Reporting' Segment 'Dept. Manager' Routing type Routing rules Routing options Deadline date Deadline handler Segment 'Travel Expenses Condition 'Total >1000' Condition 'Approved'	✓ View History Notify Subsequent Routing to Requester Notify Action Result to Requester Switch to Other Form for Display Authorize Reassignment Authorize Delegation View Other Actors	
Name of the state	1	

Figure 8

Event 'Cycle' > External External1:	Segment ID External1	en for the second secon	
External handler	Label		
	Comment	CONTRACTOR SANS CONTRACTOR SANS	
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Figure 9

Event 'Cycle'	Yield for external processing tas	k No T
External 'External' External handler	Aliae	
Same Color to the Same Color t	Server	v.e.
	Database	
	Agent	

Figure 10

Event 'Expense Reporting'	
Segment 'Dept. Manager'	<u>✓</u> Set Deadline 1108
Routing type	
Routing rules	Deadline Type Handling Margin
Routing options	
Deadline date	1102 Handling Margin
Deadline handler	Time Unit 1104 User Defined Deadline Date Days
Segment 'Travel Expenses	
Condition 'Total >1800'	Handling Margin O
Condition 'Approved'	
***	\1106
l'	
AV 92884 N. 9. 2. 2. 3. 3. 3. 3. 3. 3. 3. 3. 3. 3. 3. 3. 3.	
Inspector Comments	
Comments	

Figure 11

			_1202
Event 'Expense Reporting	How should FlowBuilder han	dle this d	feadline Send Reminder 🔻
Routing rules	Time unit	Days	
Routing options Deadline date	Start sending reminders	2	before deadline
Deadline handler	Stop sending reminders	0	after deadline
Segment 'Travel Expense Condition 'Total >1000'	Repeat interval	1	
Condition 'Approved'	Repeat number	1	
	Who should FlowBuilder not		dline is exceeded
	Notify Requester ——	1204	
	\square Notify People -12	06	-1208
200			
	What should FlowBuilder do	if reminde	er is ignored Abort Cycle
	Who should FlowBuildernoti	fy if remin	nder is ignored
e service de la constante de l	Notify Requester		a de la companya del companya de la companya del companya de la co
	Notify People		
Line Control of the C	4 (Fig. 27) - 10 (Fig. 27)		
Inspector Comments			

Figure 12

Event 'Expense Reporting' Segment 'Dept. Manager' Segment 'Travel Expenses Depa Condition 'Total >1000' Condition 'Approved' Previous results Formula On requester	Previous result condition: All Succeed ✓ Specified Segments Must Succeed ✓ Specified Segments Can Fail
K Section 1	

Figure 13

Event 'Expense Reporting' Segment 'Dept. Manager'	Document Formula
Segment 'Travel Expenses DelCondition 'Total >1000'	Da 🐔
ক Condition 'Approved' Previous result	
Ou isdnester Louisdnester	
Inspector Comments	

Figure 14

1502		

Set:Réquester Filter		
Requester is assigned the following roles	—1504 Inclu	de subtre
William and S. S Assessment		Ø
Requester is not assigned the following i	oles —1506	
	Post	'দ
Requester belongs to the following orga	nizations —1508	
	[m]	IVI
Requester does not belong to the follow	ng organizations—1510	
		īл ·
	1-18	

Figure 15

Composed Role	Evaluation Result	Remarks
{"Philip Collins/TRILOG"}	Philip Collins/TRILOG	This is equivalent to choosing a static user from your Name and Address Book.
Line Manager ({"Philip Collins/TRILOG":"Mary Davis/TRILOG"})	Line Manager of Philip Collins/TRILOG Line Manager of Mary Davis/TRILOG	The Notes formula is evaluated to a user list then the simple role is applied to each user independently.
{@UserName}	The workflow requester	Do not use @UserName in a formula, as the user who launched the FlowBuilder Router is returned.
Secretary({@Subset(\$Updat edBy;-1)})	The secretary of the user who last updated the document	Only valid if the Form is not marked anonymous.
Line Manager ({FB_Requester})	The Line Manager of the Requester	This syntax is equivalent to Line Manager.
[Project]	The Project field in the document is interpreted as a role. Usually, users will use a dropdown list with the existing projects and have them available as roles in the Planner. If the user selects Project A for instance, MORSE will evaluate the role Project A to determine the recipients.	Square brackets can be used in the same way braces are used. MORSE would simply interpret the result of the formula as roles that yet need to be evaluated to recipients.
Secretary (Accounts Payable({FB_ActionUser})	The secretary of Accounts Payable of all users who were acting on the document in the previous workflow segment.	Roles at any level may be composed.

Figure 16

Event 'Cycle' External 'External1'	Subflow ID Subflow1
Subflow 'Subflow1'	Label
	Target Cycle 1704
	Commen

Figure 17

	1802						
Routing I	ype 🎾						
Routing Type	Combined Approval/Edit						
Notification Message	Default Approval Notification						
Routing Category	Activity required						
Activity Label							
Activity Description	You are required to Approve or Deny this request. You are allowed to update the following information if needed.						
Document Access	Editor						
Activity Status Labels							
Pending Status	Pending						
Success Status	Approved						
Failure Status (optional)	Denied						
Activity Result Notification							
Success Message	Successful Approval Message						
Fäilure Message	Denial Message						
and the second							

Figure 18a

		-1804
Routing	Ivos 30/	
	The state of the s	
Routing Type Notification Message	Simple Review Default Review Notification	
Routing Category	Purely informational	

Figure 18b

	1800	1806					
Routing							
Routing Type	Approval						
Notification Message	Default Approval Notification	=					
Routing Category	Activity required	Ŧ					
Activity Label							
Activity Description	You are required to Approve or Reject the above request						
Document Access Activity Status Labels	Read only						
Pending Status	Pending	=					
Success Status	Approved						
Failure Status (optiona) Rejected						
Activity Result Notificat	ion						
Success Message	Successful Approval Message						
Fallure Message 🗵	Denial Message	$\overline{\bullet}$					

Figure 18c

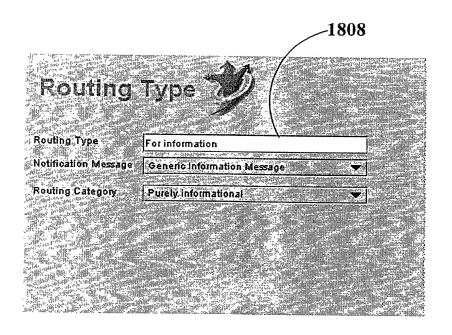


Figure 18d

	1810	
Routing		
Routing Type	Review	Ī
Notification Messagé	Default Review Notification	
Routing Category Activity Label	Activity required]
Activity Description	Please acknowledge that you reviewed this document	
Document Access. Activity Status Labels	Editor]]
Pending Status	Pending	ī
Suocess Status	Reviewed OK	
Failure Status (optional)	Back for changes	ī
Activity Result Notification		
Success Message	Successful Review Message	Ī
Failure Message	Denial Review Message	Ī

Figure 18e

Figure 19a

Notification Message

Default Approval Notification

This is the default message associated with all approval octions unless overriden in a workflow segment route description

{FB_Event} from {@Name([CN];FB_Requester)}: Approval Required

Please approve the following document requested by [@Name([Abbreviate];FB_Requester)]:

Z Append URL
Z Keep URL Param
Z Append Documk

[FB_Event/Approval Required

Figure 19b

Notification Message

Message description

Default Review Notification

This is the default message associated with all review actions unless overriden in a worldlow segment route lescription

[FB_Event]: Review requested by @Name([CN];FB_Requester)}

Please review the following document requested by [@Name([Abbreviate];FB_Requester)]:

区 Append URL 区 Keep URL Para 区 Append DooLin

The FlowBuilder Router will evaluate all fomulas at run time. The following example uses FlowBuilder technical fields from In both Subject and Body, you can include the text of any Notes Formula acting on the routed document between braces

Example:

[FB_Event]:Approval Required

Request submitted by [@Name([CN]:FB_Requester)] on [@Date(FB_Request Time)]

Figure 19c

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xample

FB_Eventl.Approval Required

equest submitted by (@Name(ICN);FB_Requester)) on (@Date(FB_RequestTime))

Figure 19d

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Reviewer had several remarks on the document submitted on {@Text(FB_RequestTime)}. See comments:

2 Append URL

M Append Doclink

Building confext sensitive messages:

Figure 19e

Notification Message

🗽 Generic Information Message

Generic Notification (purely informational)

Notification about {FB_Event}: Document submitted by

@Name([CN];FB_Requester)].

Document submitted by {@Name([CN];FB_Requester)} on [@Text(FB_RequestTime)].

| Z Append URL | Z Keep URL Parame | Z Append Doclink

in both Subject and Body, you can include the text of any Notes Formula acting on the routed document beloveen braces. The FlowBuilder Router will evaluate all formulas at run time. The following example uses FlowBuilder technical fields from

Example:

{FB_Eventy:Approval Required

Figure 19f

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In both Subject and Body, you can include the text of any Notes Formula acting on the routed document between blaces. The FlowBuilder Router will evaluate all formulas at fundime. The following example uses FlowBuilder technical fields from the Workflow Bubform.

Example: (FB_Event; Approval Required:

Figure 19g

Notification Message 7	
Message id Stames Special	
Message description.	
Subject This the special message for you	
Body: lot of money	ou a
Coviens	
Building context sensitive messages:	
In both Subject and Body, you can Include the text of any Notes Formula acting on the touted document between braces. The FlowBuilder Router will evaluate all formulas afron time. The following example uses FlowBuilder technical fields from the Wo	rding on the routed document between biscess grexample uses FlowBuilder technical fields from the Wo
Framole	

Figure 19h

								n the routed document between braces. Ple uses FlowBuilder technoal fields from the Workflow Sub		
Notification Message 2	18, 20	Successful Approval Message	FP Fvent: Your request has been approved.		The request you submitted on {@Text(FB_RequestTime}} has been approved.	K. Append URI. K. Keep URI. Parameters	M. Append Dockink. nstitive messages	In both Subject and Body, you can include the text of any Notes Formula acting on the nouted document between braces. The FlowBuilder Router will evaluate all formulas at run time. The following example uses FlowBuilder technical fields from the Workflow Sub Example.	FB_Event Approval Required Request submitted by (@Name(ICN); FB_Requested) on {@Date(FB_Request Time)}	
Ë	Message Id	Message description	Subject		VDO N	Options	M. Append Dool. Building pointext sensitive messages	In both Subject and E The FlowBuilder Rou Example	(FB_Event) Approval Required Request submitted by (@Name()	

Figure 19i

					on the routed document between braces. mpre uses FlowBuilder technical fields fo
Notification Méssage ${\mathscr V}$	Successful Review Message Successful Review Message	FB_Event : Review completed successfully.	The document you submitted on [@Text[FB_RequestTime]] has been reviewed and approved.	☑ Append URL ☑ Keep URL Parameters ☑ Append Bot Link	Building context sensitive messages. In both Subject and Body, you can indude the text of any Notes Formula acting on the routed document between bisces. The FlowBuilder Routerwill evaluate all formulas at tun lime. The following example, uses FlowBuilder technical fields for
Notification	Message description Su	The day of	Dody. Th	Dottons Supplier	Building context sensitive messages In both Subject and Body, you can ind The FlowBuilder Router will evaluate a

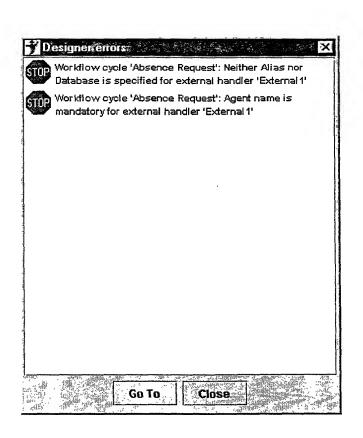


Figure 20

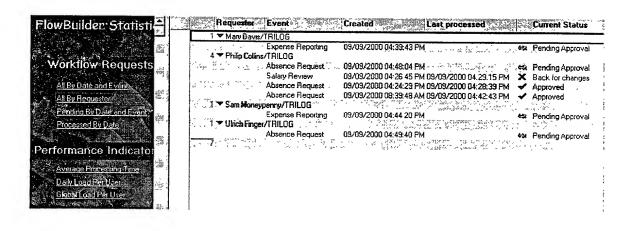


Figure 21



Actual Document

9/9/00 4:48:18 PM New Event 'Absence Request' detected: Workflow Cycle initiated on form 'Absence Request'. 9/9/00 4:48:18 PM Requester = Philip Collins/TRILOG
9/9/00 4:48:18 PM Absence Request: Executing Workflow Segment
9/9/00 4:48:18 PM Notification sent to the following recipients:
Mary Davis/TRILOG - Role: Line Manager -> Line Manager Approval

9/9/00 4:48:18 PM Number of people required for success = 1
9/9/00 4:48:18 PM User(s):

Mary Davis/TRILOG

Notified about: Absence Request from Philip Collins: Approval Required

Figure 22

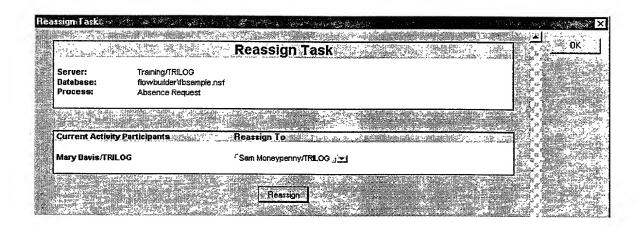


Figure 23





Workflow History: 👍 : Actual Document 📔 . 🤫

9/9/00 4:48:18 PM New Event 'Absence Request' detected: 'Workflow Cycle initiated on form 'Absence Request'.

9/9/00 4:48:18 PM Requester = Philip Collins/TRILOG

--> Line Manager Approval

9/9/00 4:48:18 PM Absence Request: Executing Workflow Segment 9/9/00 4:48:18 PM Notification sent to the following recipients: Mary Davis/TRILOG - Role : Line Manager

9/9/00 4:48:18 PM Number of people required for success = 1
9/9/00 4:48:18 PM User(s): Mary Davis/TRILOG
Notified about: Absence Request from Philip Collins: Approval Required
9/9/00 9:18:49 PM Action Approval reassigned by Mary Davis/TRILOG to Sam Moneypenny/TRILOG
9/9/00 9:18:49 PM User(s): Sam Moneypenny/TRILOG
Notified about: Absence Request from Philip Collins: Approval Required

Figure 24

Address Http://localhost/fbmanager.htm	n ∰ ∂Go Link
FlowBuilder Servlet Manager	FlowBuilder Router Information
Enter Password Change Password Confirm	Service Database High Normal Low Deadline Priority Priority Manager I flowbuilder\fbadmin.nsf 15 60 300 600
flowbuilder\fbadmin.nsf	
Set High Priority 15 Set Normal Priority 60 Set Low Priority 300 Set Deadline Frequency 600	

Figure 25